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■ 1984 Annual Western Show: The [illegible]

CableVision

The news and features weekly of [illegible]

December 17, 1984

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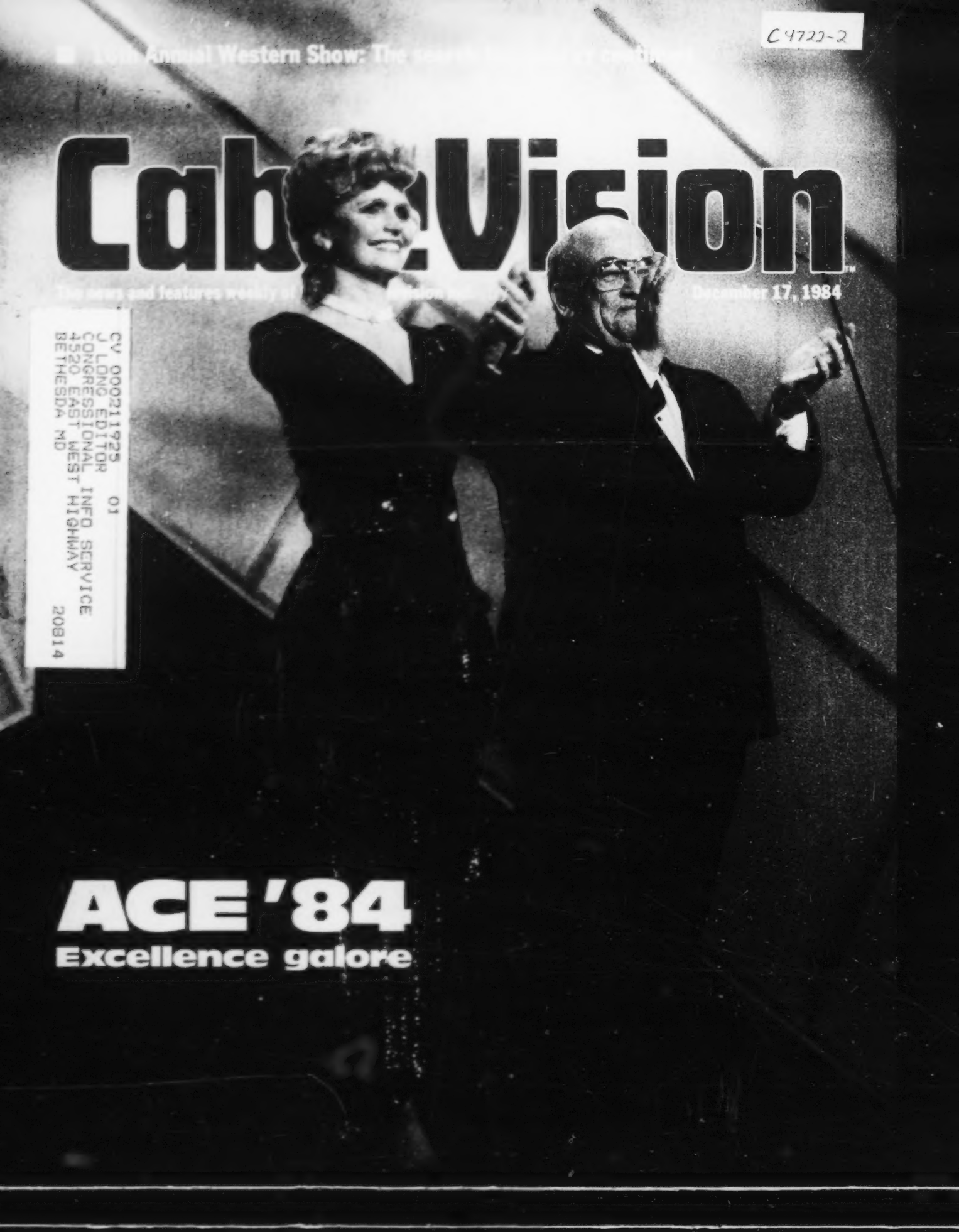

ACE '84
Excellence galore

Leading the week 9-20

Western Show

The California Cable Television Association's 16th Annual Western Show drew between 7,000 and 8,000 industry executives for an intensive round of discussions focused on the new regulatory environment and opportunities for cooperation in the pursuit of higher penetration and new revenue streams. Augmenting the search for efficiency was a burst of new product announcements by the industry's leading vendors and new initiatives by programmers toward cooperation with operators in advertising, marketing and the war against theft.

RHODA POLLACK

Comedian Richard Belzer does a hilarious impression of President Ronald Reagan at the Ace Awards ceremony at the Beverly Hills Theater in California Dec. 4.

Ace Awards

HBO triumphed at the 1984 Ace Awards ceremony Dec. 4, walking away with 11 trophies. Showtime took four awards and Arts & Entertainment, WTBS and Lifetime each accepted three at the black-tie soiree held at the Beverly Hills Theatre.

Showtime picks vendor

Showtime/The Movie Channel has chosen M/A-Com as its vendor for the encryption equipment it will use to scramble its satellite signals. The M/A-Com contract is valued at $5 million.

CCI campaign test

The Council for Cable Information reports encouraging results for the organization's public awareness campaign in three test markets, and American Television & Communications Corp. plans to ask all of its systems to tie into the campaign on the local level if the series is approved for national exposure.

RHODA POLLACK

Cable boosters express the upbeat mood at the Western Show Convention in Anaheim, Calif.

Comsat abandons DBS

Comsat has abandoned its DBS plans and ended its talks with Prudential Insurance and UPE CEO Douglas Ruhe about merging Comsat's Satellite TV Corp. with United Satellite Communications. Meanwhile, Hughes Communications received FCC approval for its DBS plans, scheduled for launch in 1989, three years later than STC's launch was scheduled.

Dereg standards

The Federal Communications Commission has proposed "one possible approach" for the standard of effective competition for which local regulation of cable services would be removed in two years.

Parra to CTAM

The Cable Television Administration and Marketing Society has named Victor Parra as its new executive director. Parra's appointment reflects professional association experience critical to CTAM's future, according to CTAM President Ed Bennett.

Sections

Programming 28

Local origination programming has grown up, at least at Viacom Cablevision of San Francisco. What began as a response to FCC regulations has blossomed into an influential medium in this city with an aware and highly specialized audience. Associate Editor Louis Chunovic reports Robert DiMatteo gives the thumbs-up to Cinemax's *The Richard Belzer Show*.

Marketing/Advertising 32

TCI has pooled close to $4 million and is spearheading a promotion blitz involving eight basic cable networks. The campaign covers 350 TCI systems and is scheduled to run through Dec. 31, Associate Editor Cecilia Capuzzi reports. And *CableVision* looks at how ATC's Honolulu, Hawaii, system is paying for a promotion that effectively tells subscribers what *they're* paying for.

Business & Finance 36

Cable and pay TV's financial performance both in 1983 and over the last five years has won high marks from the investment banking firm of Veronis, Suhler & Associates. Associate Editor Sally Russell spells out the encouraging findings of a new report by that firm which indicate that cable is distinguishing itself from the rest of the communications industry when it comes down to the bottom line. And Don Barden seems to be making some headway in his overtures to the two losing bidders for the Detroit franchise.

Government & Law 43

In a Nov. 28 statement the Reagan Administration opened the doors to competitors to Intelsat, a worldwide satellite consortium. Washington, D.C. Bureau Chief Paul McCloskey details the tall task ahead for the FCC: to sort through the applications of would-be competitors and make some tough decisions. Los Angeles Bureau Chief Eric Taub also spells out how that city's new Department of Telecommunications is getting down to business in prompt fashion.

About the cover

Ed Asner and Lee Remick, co-hosts for the sixth annual presentation of the Awards for Cable Excellence, lead an ovation honoring the cable industry. Remick won an award for her performance in Arts & Entertainment's *I Do! I Do!*, and Asner was a nominee for Showtime's *A Case of Libel*. Photography by Rhoda Pollack. **See Leading the Week.**

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Cable, pay TV lead the pack in growth rate

NEW YORK—The cable and pay television industry has performed "superlatively" both in terms of growth over the last five years and in terms of overall financial performance in 1983. That's the conclusion reached by Veronis, Suhler & Associates, an investment banking firm, in a new report after analysts there studied financial records from 226 companies involved in 10 segments of the communications industry over the last five years.

The only sour notes for the cable and pay TV industry are in return on assets and in margin performances in 1983, the last year studied for the report. VS&A attributes those results to cable's high asset base and its rapid expansion in recent years.

For the latest edition of its Communications Industry Report, the New York-based investment banking concern looked in detail at the financial records of 30 companies involved in the cable and pay TV industry. The survey covered three types of firms: multiple system operators, cable programmers and what VS&H calls alternative distribution companies (STV and SMATV operators and specialty distributors who sell programming to airlines and hotels). VS&H excluded results from lines of business unrelated to cable or pay TV, such as Time Inc.'s publishing group.

The survey found that cable and pay TV led all other segments of the communications industry in compound annual growth over the last five years. Last year, cable's revenue growth rate was more than twice that of the next highest group, which was the advertising segment. In all other measures of growth last year, the cable segment ranked in the top three. Its operating margins were the second best in the communications industry, while its cash flow margins came out on top.

In the period from 1979 to 1983 cable and pay television companies achieved compound annual revenue growth of 45.1 percent, according to the report. VS&H notes that the communications industry segment began to show signs of maturation in 1983, when revenue growth slowed to what the report describes as the still extraordinary rate of 31 percent from the 50.6 percent rate of the previous year.

Operating income growth also slowed last year, from a rate of 51.4 percent in 1982 to a rate of 31.1 percent last year. However, over the five-year period, pre-tax operating income more than doubled, growing at a compound annual rate of 35.3 percent.

Assets more than tripled in the five-year period, while cash flow on a pro-forma basis nearly tripled. While assets grew at a compound annual rate of 45.5 percent, that growth slowed from 61.8 percent in 1980 to 18.6 percent in 1983. Cash flow averaged an increase of 39.5 percent each year, with growth slipping from 53.8 percent in 1982 to 32.3 percent in 1983.

Despite the growth in revenues and operating income, cable and pay TV companies saw their profit margins decline 25 percent over the five years which ended in 1983. Pre-tax operating margins settled out over the last four years in the 18 to 19 percent range, after dropping from 24.1 percent in 1979 to 19.4 percent the following year.

With cable system operation being such a highly capital intensive business, cable and pay TV companies had one of the lowest operating income returns on assets and the lowest asset turnover of any segment of the communications industry, according to the report. Pre-tax operating income return on assets was a mere 9.8 percent, while assets in 1983 turned over at a rate of only once every two years or .54 times a year last year.

With cable's appetite for fixed investment capital, VS&A found that the industry has massive depreciation and amortization streams which yield impressive cash flow when added back into operating income. According to the study, depreciation and amortization addbacks represent about half of cash flow for cable and pay TV companies.

Cash flow return on assets amounts to 17.6 percent, double operating income return on assets, while cash flow margins last year came to 32.5 percent, nearly double operating income margins. VS&A points out that cash flow margins held firmer than operating income margins, slipping only 15 percent from 1979 levels.

Some of the most interesting findings in the report come from the section where VS&A broke out companies within the cable and pay TV segment as growth or performance leaders. Concerns from all three portions of the industry were represented among the top

Cable & pay television
1979-1983 Segment operating data

(in millions)

	1979	1980	1981	1982	1983
Revenues	777.1	1,137.3	1,747.4	2,632.0	3,447.7
Pre-tax operating income	187.2	221.1	315.6	477.8	626.5
Assets	1,546.1	2,502.3	4,011.2	5,846.7	6.935.9
Pro-forma operating cash flow	296.1	378.0	551.4	847.8	1,121.9

Cable & pay television
1979-1983 Growth and performance measures

Segment rank in communications industry in ()

	Quantity used in measure			
Growth/performance measure	Revenues	Pre-tax operating income	Assets	Pro-forma operating cash flow
1979-83 Compound annual growth	45.1% (1)	35.3% (1)	45.5% (1)	39.5% (1)
1983 Growth	31.0% (1)	31.1% (3)	18.6% (2)	32.3% (2)
1983 Operating margins		18.2% (2)		32.5% (1)
1983 Margin index (1979 = 100)		75.0 (9)		85.0 (8)
1983 Return on assets		9.8% (9)		17.6% (7)
1983 Asset turnover			0.54 (10)	

three in revenue and operating income growth last year.

Financial News Network led the pack with a 457.1 percent jump in revenues last year. Graphic Scanning's STV operations came in second with a tripling of revenues, while MSO Scripps-Howard saw its revenues climb 148 percent in 1983.

In terms of operating income growth last year, MSO Selkirk came out on top with a 240 percent jump, while Wometco Enterprises' STV operations placed second with a 126.9 percent increase. Turner Broadcasting ranked third with a 96 percent growth in 1983 operating income.

Looking at five-year compound annual growth, Selkirk also led in the revenue category with a 157.1 percent jump in revenues averaged over the five-year period. Centel came in second with 83.1 percent, while Movie Systems Inc. placed third with 73.5 percent compound annual revenue growth. Cable and pay TV as a whole averaged 45.1 percent, while the communications industry averaged 12.9 percent.

However, Centel outperformed Selkirk in compound operating income growth with a 128 percent gain, with Wometco placing second with an 84.9 percent compound annual growth rate. Rogers Cablesystems took third with a 64.9 percent compound annual growth rate in operating income. The cable segment averaged 35.3 percent, while the industry achieved 11.6 percent.

Both Multimedia and Centel more than doubled their assets each year on average, with Multimedia scoring a 131 percent compound annual growth rate of assets and Centel coming in with a 100.6 percent compound annual increase. Cable and pay TV averaged 45.5 percent and the communications industry averaged 17.7 percent.

In terms of performance VS&A ranked TCA Cable on top, saying that MSO made the most efficient use of its assets last year. TCA achieved a 27.3 percent operating income return on assets and a 40.4 percent cash flow return on assets. Turner Broadcasting placed second with a 20.4 percent operating income return on assets, and Time Inc. came in third with 18.7 percent. The cable segment, meanwhile, achieved a 9.8 percent operating income return on assets, while the overall communications industry reached 18.2 percent. In the area of cash flow return on assets, Spectradyne placed second with 31.3 percent, above Turner Broadcasting, which achieved a 28.5 percent cash flow return on assets.

United Cable Television, TCA Cable and Rogers Cablesystems recorded the

November, 1984

Sold

Highland Beach Cable TV

Serving the city of Highland Beach, Florida.

The undersigned represented the seller in this transaction. This notice appears as a matter of record only.

COMMUNICATIONS EQUITY ASSOCIATES

851 Lincoln Center
5401 W. Kennedy Blvd.
Tampa, FL 33609 813/877-8844

This notice appears as a matter of record only.
October 1984

Sold:

Marquette Cablevision

Serving Marquette, surrounding towns & Munsing, Michigan.

Sale represents 16,400 basic subscribers.

Ted Taylor represented the sellers.

DANIELS & ASSOCIATES

2930 E. Third Avenue
Denver, Colorado 80206
303/321-7550

Financial Services to the Cable Communications Industry.

most impressive operating margins last year with 37.6 percent, 36.5 percent and 34.5 percent, respectively. The cable and pay segment averaged 18.2 percent, while the communications industry as a whole averaged 15 percent. The trio also brought more than half of the year's cash flow to the bottom line, with cash flow margins of 57.9 percent, 54 percent and 51 percent, respectively. That compares with 32.5 percent for the segment and 18.6 percent for the industry. Of the companies with programming operations, only Time Inc. placed in the top 10 in margins last year, coming in ninth in the category of operating income margins.

Wometco and Centel, leaders in compound annual growth rates for operating income and cash flow over the five years, also improved their margins over the period. Wometco tripled its 1983 margins over the 1979 levels, while Centel more than doubled its margins. Those two firms also raised their cash flow margins, with Wometco's climbing 90 percent and Centel's moving up 44 percent. TCA, Heritage and TCI also achieved improved operating income.

—Sally Russell

Detroit's Barden reaches an agreement in principle with City Communications

DETROIT—Detroit franchise award-winner Barden Cablevision last week appeared to be making some headway in efforts to clear away any potential lawsuits that could prevent or delay the completion of a final franchise agreement with the city of Detroit.

Company President Don Barden is currently in discussions with the two losing bidders, City Communications Inc. and Detroit Inner Unity Bell Cable Systems, about the possibility of involving those groups in the ownership of Detroit's cable system—or at least reimbursing them for the expenses they incurred in pursuing franchise bids there.

Barden said late last month he had reached an agreement in principle with CCI officials to reimburse the company for the money it spent pursuing the franchise. Barden would not discuss the amount of money involved, except to say it was in the hundreds of thousands of dollars. He added that negotiations concerning CCI taking a small ownership position in the Detroit system are still continuing, although he would not reveal the percentage of ownership being discussed. Officials from CCI were not available for comment by press time last week.

Meanwhile, Percy Sutton, vice chair-

October 1984

Morgan County Cablevision, Inc.
has been sold
to a Partnership formed by
Paradigm Communications, Inc.

Serving over 2,800 basic and 1,250 pay t.v. subscribers in Wartburg, Oakdale and Morgan County, Tennessee

The undersigned represented the seller in this transaction. This notice appears as a matter of record only.

COMMUNICATIONS EQUITY ASSOCIATES

This notice appears as a matter of record only.
October 1984

Sold:

Texkan Communications

Serving several towns in South Texas and Kansas

Sale represents 5,900 basic subscribers.
Ted Taylor represented the sellers.

DANIELS & ASSOCIATES
2930 E. Third Avenue
Denver, Colorado 80206
303/321-7550

Financial Services to the Cable Communications Industry.

Franchising calendar

This chart examines the franchise status of communities since September 1984.

Arizona

Gilbert—award to Masada Corp. 8/14/84 (3,000 homes).

California

Chino—preliminary award to Buena Vision (12,000 homes).
Claremont—Group W withdrew proposal (9,800 homes.)
Commerce—reached lease agreement with Falcon Communications 11/5/84 (3,000 homes).
Duarte—lease agreement reached with KTS Corp. for operation of city-owned system 8/15/84 (7,100 homes)
East Yolo—proposals from Cablevision, Sonics, Yolo Communications, and Federal Communications Inc. (10,000 homes).
La Puente—award to United Cable 11/28/84 (8,600 homes).
Los Altos—negotiating wih United Cable TV (9,000 homes).
Palo Alto—negotiating with Cable Communications Co-op of Palo Alto and City Cable Partners Inc. (23,000 homes).
Rosemead—soliciting franchise proposals (13,114 homes).
South Monrovia—award to Falcon Communications 9/18 (5,400 homes).
Sunnyvale—refranchising award to Sunnyvale Cable TV 2/14/84 (43,000 homes).
Yorba Linda—deadline extended for statements of interest (12,000 homes).

Delaware

Wilmington—negotiating with Rollins Cable (140,000 homes).

District of Columbia

Washington, D.C.—award to District Cablevision 7/10/84 (254,000 homes).

Florida

Fellsmere—award to Sci Ad 3/29/84 (1,500 homes).

Illinois

Chicago—Area I negotiating with Communications and Cable (300,000 homes); Area II award to Group W (217,000 homes); Area III award to Group W (193,000 homes); Area IV award to Chicago Cable Communications (TCI/Cross Country joint venture) (226,000 homes); Area V award to Continental Cablevision (188,000 homes).
Countryside—award to Cablevision of Chicago 6/13/84 (2,200 homes).
Elmwood Park—reviewing proposals from Multimedia, Continental, and Metrovision Inc. (9,500 homes).
Naperville—proposals from Joyce Cable and Rite Cable (17,500 homes).
St. Charles, Geneva—award to Centel 7/2/84 (10,000 homes).
Wheaton—award to Centel 7/2/84 (16,000 homes).
Winnetka—survey showed interest in cable insufficient to warrant franchise.
Woodbridge—terminated negotiations with Multimedia (260 homes).

Kentucky

Fulton—city plans to grant preliminary award to TCI (2,400 homes).

Maryland

Baltimore—negotiating with United Cable (302,000 homes).

Massachusetts

Belchertown—reissued RFP.
Belmont—municipal ownership approved by general court, issued RFP (2,760 homes).
Berkley, Dighton, Freetown—provisional license to Continental Cablevision.
Boxborough—awaiting amended applications from Nashoba and Adams-Russell (3,100 homes).
Cambridge—received proposals from American Cable Systems and two locally organized private concerns, Cambridge Cablevision Corp. and Cable Plus (43,000 homes).
East Bridgewater—preliminary award to Continental Cable 10/1/84 (2,500 homes).
Groton—received final proposals from United Cable and Nashoba Communications (2,000 homes).
Hamilton and Wenham—award to Continental Cable 3/5/84 (2,300 homes).
Holden—award to Massachusetts Cablevision Systems Inc. 7/84 (4,000 homes).
Holliston—award to Massachusetts Cablevision Systems Inc. 7/84 (3,922 homes).
Lincoln—temporarily suspended franchising process. (1,700 homes).
Marblehead—proposals received from Adams-Russell, Continental Cablevision, and Nashoba.
Medfield—preliminary award to Massachusetts Cablevision Systems 10/84 (3,400 homes).
Mendon—provisional license award to Massachusetts Cablevision Systems Inc. 8/84 (1,200 homes).
Middleborough—award to Continental Cablevision 5/14/84 (3,834 homes).
Nahant—awaiting response from Warner Amex (1,433 homes).
Sandwich—award to Campbell Communications (5,000 homes).
Seekonk—preliminary award to Massachusetts Cablevision (6,000 homes).
Shirley—provisional license granted to Nashoba Communications 10/29/84 (1,827 homes).
Southborough—provisional license to Greater Worcester Cablevision (2,000 homes).
Sterling—award to Wachusett Cablevision (2,000 homes).
Stow—provisional license to Adams-Russell 9/84 (1,600 homes).
Wayland—award to Continental Cablevision 6/4/84 (3,500 homes).
Westminster—preliminary award to Adams-Russell; Adams-Russell requested revision of rate structure.
Weston—award to Continental Cable Cooperative 8/6/84 (3,000 homes).
Westport—award to United Cablevision Funding 9/4/84 (5,500 homes).

Michigan

Homer Township—negotiating with Whitney Television (800 homes).
Lake Orion, Orion Township—award to Tribune United 11/84 (7,800 homes).
Westland—award to Continental Cablevision 2/84 (29,000 homes).

Minnesota

Amboy—award to Mid Communications Inc. 7/84 (280 homes).
Avon—award to WesTel Inc. 2/84 (280 homes).
Barrett—award to Battlelake Cable 7/84 (165 homes).
Belle Plaine—award to Dow-Sat of Minnesota 11/9/84 (973 homes).
Big Lake, Buffalo, Cokato, Dassel, Delano, Elk River, Monticello, Rockford, Watertown, Maple Lake—award to Rite Cable, under construction. (10,200 homes).
Bird Island—award to North American Communications Corp. 10/84 (566 homes).
Boyd—municipal ownership approved 1/84 (140 homes).
Cannon Falls—award to North American Cable Communications Corp. (1,060 homes).
Chanhassen, Carver County, and Hennepin County—award to Dowden Communications 1/5/84.
Claremont—award to WesTel Inc. 2/84 (225 homes).
Credit River—award to North American Communications Corp. 10/84 (880 homes).
Eden Valley and Watkins—award to WesTel Inc. 2/84 (640 homes).
Ellendale, Geneva—award to WesTel Inc. 3/84 (380 homes).
Elizabeth—award to M & E Cable TV 1/84 (90 homes).
Floodwood—award to Individual Satellite System Inc. 8/84 (325 homes).
Glenville—award to WesTel 6/84 (275 homes).
Good Thunder—award to Mid Communications Inc. 7/84 (225 homes).
Grand Meadow—award to Southern Cablevision Inc. 9/84 (360 homes).
Hill City—award to Individual Satellite Systems 11/84 (400 homes).
Hinckley—award to Savage Communications 7/84 (420 homes).
Hokah—award to Valley Video Systems Inc. 7/84 (270 homes).
Holdingford—award to WesTel Inc. 2/84 (245 homes).
Howard Lake—award to WesTel Inc. 8/84 (510 homes).
Kerkhoven—award to Heritage Communications 7/84 (310 homes).
Kimball—award to WesTel Inc. 5/84 (250 homes).
LeCenter—award to WesTel Inc. 4/84 (825 homes).
Lester Prairie, Winsted—award to Dowden Communications 7/84 (1,000 homes).
Lindstrom, Stacy—award to Dow-Sat of Minnesota (1,230 homes).
Mabel—award to Valley Video Systems Inc. 6/84 (325 homes).
Maple Plain—award to Dow-Sat of Minnesota (481 homes).
Mapleton—award to WesTel Inc. 8/84 (600 homes).
Mazeppa—award to Individual Satellite Systems 9/84 (280 homes).
Medford—award to WesTel Inc. 7/84 (300 homes).
Montrose—award transferred to Valley View 8/84 (300 homes).
Morristown—award to Cannon Valley Telecom Inc. 7/84 (250 homes).
Morton—award to Todd Communications Inc. 5/84 (225 homes).
Murdock—award to Cavanaugh Cable Co. 6/84 (140 homes).
New Prague—award to Valley View Cable Inc. 7/84 (1,130 homes).
Nisswa—award to Interlake Cablevision Inc. 5/84 (1,100 homes).
Northern Dakota City—prelimnary award to Continental (25,000 homes).
Norwood, Young America, Hamburg—award to WesTel Inc. 5/84 (1,100 homes).
Onamia—award to WesTel Inc. 5/84 (300 homes).
Oslo—award to Oslo Cable 4/84 (170 homes).
Pierz—award to WesTel Inc. 8/84 (420 homes).
Renville—award to WesTel Inc. 7/84 (600 homes).
Rite—award to Benton Cooperative Telephone Co. 8/84 (165 homes).
Royalton—award to WesTel Inc. 4/84 (270 homes).
Sacred Heart—award to WesTel Inc. 4/84 (300 homes).
St. Joseph—award to WesTel Inc. (1,100 homes).
St. Paul—city wins appeal in favor of Continental Cablevision (111,000 homes).
Sandstone—award to Savage Communications 9/84 (560 homes).
Savage—issued RFP (272 homes).
Shelly—award to Ada Cable Association 4/84 (130 homes).
Sherburn—award to Rite Cable (10,200 homes).
Spring Grove—award to Valley Video Systems 8/84 (560 homes).
Spring Lake—award to North American Communications Corp. 10/84 (920 homes).
TriCity Cable Commission (Cold Springs, Richmond, Rockville)—award to WesTel Inc. 8/84 (1,200 homes).
Truman—award to Terril Telephone Co. 5/84 (550 homes).
Waconia—preliminary award to WesTel Inc. (1,024 homes).
Waterville, Elysian—award to WesTel Inc. 8/84 (750 homes).
Waubeen—award to Harold Investments Inc. 9/84 (150 homes).
Wendell—award to M & E Cable 4/84 (95 homes).
West St. Paul, South St. Paul, Mendota Heights, Mendota, Inner Grove

Heights, Lilydale, Sinfish Lake—preliminary award to Continental Cablevision 6/6/84 (24,032 homes).
Windom—city council approved municipal ownership 10/27/84 (1,875 homes).

Missouri

St. Louis—award to STL Cablevision Partners Inc. (75% of city) and St. Louis City Communications (25% of city) 4/11/84 (178,000 homes).

New Hampshire

Manchester—award to United Cable.
Newton—negotiating with Harron Communications (1,124 homes).
Pelham—award to Harron Communications 3/27/84 (2,500 homes).
Sandown—reviewing proposal from Harron Co. and Continental (800 homes).
Wolfeboro—award to Lakes Cablevision Corp. 1/18/84 (833 homes).

New Jersey

Jersey City—municipal ownership under consideration (40,000 homes).
Patterson—plans municipal ownership; waiting for city council approval; RFP issued (55,000 homes).

New York

Beekman—award to Dutchess County Cablevision Assoc. 3/13/84 (2,100 homes).
Mt. Upton—NewChannels denied award; future uncertain.
North Salem—negotiating with Community Cable Services (1,100 homes).
Norwich—terminated franchising process (100 homes).
Portland—Tribune Cable, Harborview, and U.S. Cable sent letters expressing interest. (150 homes).
Union Vale—award to Consolidated Communications Corp. 3/7/84 (775 homes).

North Carolina

Camden County—award to Cable East 5/7/84.
Davie County—award to Summit Cable.
Jackson—award to Cable East (400 homes).

Ohio

Avon—award to Space Cable of Ohio 4/23/84 (2,000 homes).
Brooklyn—municipal ownership under consideration (4,000 homes).
Cleveland—Cable Commission voted for private ownership and is preparing RFP.
Lordstown—cable issue dropped after feasibility study.
Oberlin—preliminary award to Oberlin Cable Co-op (2,600 homes).

Oregon

Amity—award to Eagle Cable Systems Inc. 1/9/84 (800 homes).
Dunthorpe—no response to RFP.
Seattle—city is divided into four parts; Group W, Viacom and Seattle Community Cablevision serve overlapping sections of three parts; part IV is beginning franchising process.
Sylvan—evaluating proposal from Sylvan Cable Television.

Pennsylvania

Philadelphia—city is divided into four areas; Area I award to Greater Philadelphia Cablevision; Area II award to Wade Communications; Area III award to Rollins; Area IV award to Comcast 11/84 (each area: 155,000 homes).

Rhode Island

Battleground—negotiating with Cox Cable (1,000 homes).
Newport (Area 7 includes Middletown, Portsmouth, Tiverton, Little Compton)—award to Bellevue Cablevision Inc.; appealed before Rhode Island Superior Court and Rhode Island Supreme Court (29,500 homes).

Texas

Azle—award to Teltran 4/3/84 (2,200 homes).

Virginia

Berryville/Clarke County—award to Berryville TV Cable Co. 4/17/84 (600 homes).
Manassas—issued RFP (5,510 homes).
Suffolk—award to Suffolk Cablevision 2/1/84 (16,697 homes).

Washington

Battle Ground—negotiating with Cox Cable (1,000 homes).

Wisconsin

Hayward—award to Cable TV of Hayward (1,000 homes).
New Glarus—award to Telephone and Data Systems 7/17/84 (675 homes).
Waterford—award to Total TV 9/84 (600 homes).

Wyoming

Gillette—franchise renewal granted to Televents 4/18/84 (7,500 homes).

Source: International Thomson Communications Inc.

Mr. Bill, the animated clay figure that gained popularity on *Saturday Night Live*, can now be seen on USA Network's *Night Flight* each Friday and Saturday night.

Franchising in the top 50 markets

Rank	Market	Status of core city
1.	New York	Manhattan—2-OP; outer boroughs 8-FG
2.	Los Angeles	City is divided into 14 areas (A-n); 11-OP; 3-UC
3.	Chicago	City is divided into five areas; Area I-FP, Areas II, III-OP, Areas IV, V-FG
4.	Philadelphia	City is divided into four areas: Areas I, II, III, IV-FG
5.	San Francisco	OP (system to be upgraded)
6.	Boston	OP
7.	Detroit	FG
8.	Washington, D.C.	FG
9.	Cleveland	RPP
10.	Dallas/Ft. Worth	Two systems-OP
11.	Houston	Two systems-OP
12.	Pittsburgh	OP
13.	Miami	OP
14.	Seattle/Tacoma	City is divided into five parts: (4-OP), (1-BP); Tacoma-OP
15.	Minneapolis/St. Paul	OP/UC
16.	Atlanta	OP
17.	St. Louis	FG/FG
18.	Tampa/St. Petersburg	OP/OP
19.	Denver	OP
20.	Baltimore	FP
21.	Sacramento/Stockton	OP/OP
22.	Indianapolis	Two systems-OP
23.	Portland	Three systems-OP
24.	Phoenix	Three systems-OP
25.	Hartford/New Haven	Two systems-OP
26.	Cincinnati	OP
27.	San Diego	Two systems-OP
28.	Kansas City	OP
29.	Milwaukee	UC
30.	Nashville	OP
31.	Charlotte	OP
32.	Buffalo	OP
33.	Providence/New Bedford	OP/OP
34.	Orlando/Daytona Beach	Two systems-OP
35.	New Orleans	OP
36.	Memphis	OP
37.	Columbus	Four systems-OP
38.	Greenville/Asheville/Spartansburg	Three systems-OP
39.	Grand Rapids/Kalamazoo/Battle Creek	Three systems-OP
40.	Birmingham	OP
41.	Raleigh/Durham	Two systems-OP
42.	Oklahoma City	Two systems-OP
43.	Louisville	Two systems-OP
44.	Salt Lake City	OP
45.	San Antonio	OP
46.	Charleston/Huntington	Two systems-OP
47.	Norfolk/Newport News/New Hampton/Portsmouth	Four systems-OP
48.	Harrisburg/York/Lebanon/Lancaster	Four systems-OP
49.	Wilkes Barre/Scranton	Two systems-OP
50.	Albany/Schenectady/Troy	Three systems-OP

Legend

OP — operational
UC — under construction
FG — franchise granted
FP — franchise pending
PS — proposal submitted
RP — request for proposals issued
RPP — request for proposals pending
MO — considering municipal ownership
BP — beginning process

Source: International Thomson Communications Inc.